

Data to Care

CAREWare 6 Overview

Table of Contents:

1.	What You Need to Know About CAREWare 6.....	2-3
2.	Pulling Not In Care List.....	4-9
3.	Find a Client.....	10
4.	Demographic Page.....	11-12
5.	Enrollment Status.....	13
6.	Pre-Investigation.....	14-15
7.	Case Notes.....	16-17
8.	Services.....	18-20
9.	List of Services/Outcomes/Units.....	21-22
10.	Labs.....	23
11.	HIV Surveillance.....	24-25
12.	D2C Barriers.....	26-28
13.	Case Investigation Outcomes.....	29-30
14.	Case Investigation Outcomes Definitions.....	31-33
15.	Common Notes.....	34
16.	Custom Reports.....	35-38
17.	Contacts.....	39

What You Need to Know About CAREWare 6

CAREWare 6 is different than CAREWare 5 in many ways. Here are some things you need to know:

1. When you open a client record, it will open a new tab on your browser. Make sure you close the record after entering in all necessary information. If you don't, it will keep the record open in that tab even if you move on to a new client.

Find Client > Search Results > Demographics
Delete Client Back

Demographics

Personal Info	Name: Doe, John Gender: Male DOB: 01/02/1988
Change URN	JHDE0102881U
Contact Information	109 W Michigan Ave Lansing, MI 48913
Race/Ethnicity	White
HIV Risk Factors	MSM AND IDU
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007
Common Notes	Preferred Name - JD Addition Phone # on file - 098-765-4321
Provider Notes	No description supplied
HIV Surveillance	View or Edit the client's HIV Surveillance information

2. You navigate the client's record through the menu options located on the left-hand side of the record. When you want to move from one tab to the other, simply click the tab on the left-hand side. It will take you to that tab. For example, if you want to add a case note, click it.

Find Client > Search Results > Demographics
Delete Client Back

Demographics

Personal Info	Name: Doe, John Gender: Male DOB: 01/02/1988
Change URN	JHDE0102881U
Contact Information	109 W Michigan Ave Lansing, MI 48913
Race/Ethnicity	White
HIV Risk Factors	MSM AND IDU
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007
Common Notes	Preferred Name - JD Addition Phone # on file - 098-765-4321
Provider Notes	No description supplied
HIV Surveillance	View or Edit the client's HIV Surveillance information

What You Need to Know About CAREWare 6 Continued....

3. If you are in the middle of adding any record, whether it is a service, lab, etc., you will not be able to access anything else. For example, if you are in the middle of adding a screening lab and want to add a service, you must either:

1. Add the current record and save it

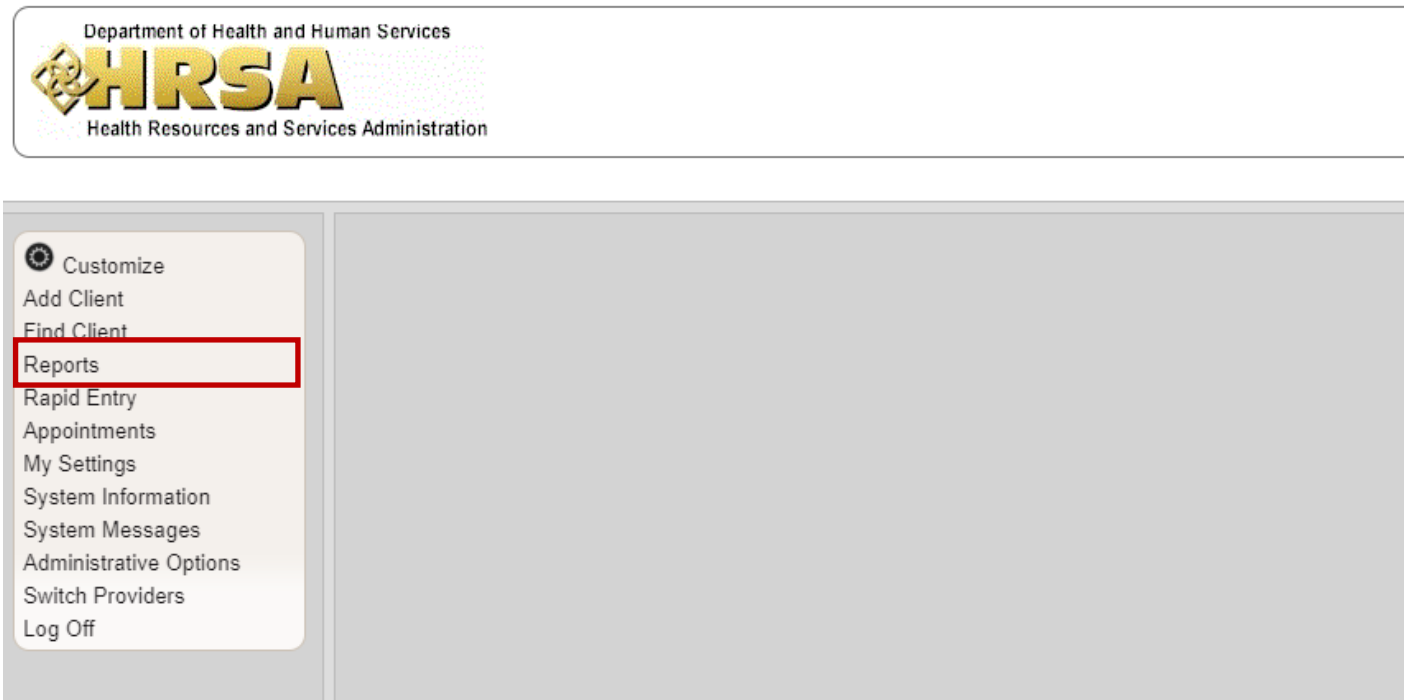
The screenshot shows the 'Add' form for Screenings in CAREWare 6. The left-hand menu is visible, listing various options like Demographics, Client Report, Encounter Report, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, Screenings, Screening Labs, Immunizations, Diagnoses, Sharing Requests, Referrals, Relations, and Counseling and Testing. The main content area is titled 'Add' and contains fields for Test Date (12/20/2019), Test Definition, Result, Action, Test Score, and Test Comments. A 'Back' button is highlighted with a red box in the top navigation bar.

If you try to access the menu on the left-hand side without doing one of the two things listed above, nothing will happen.

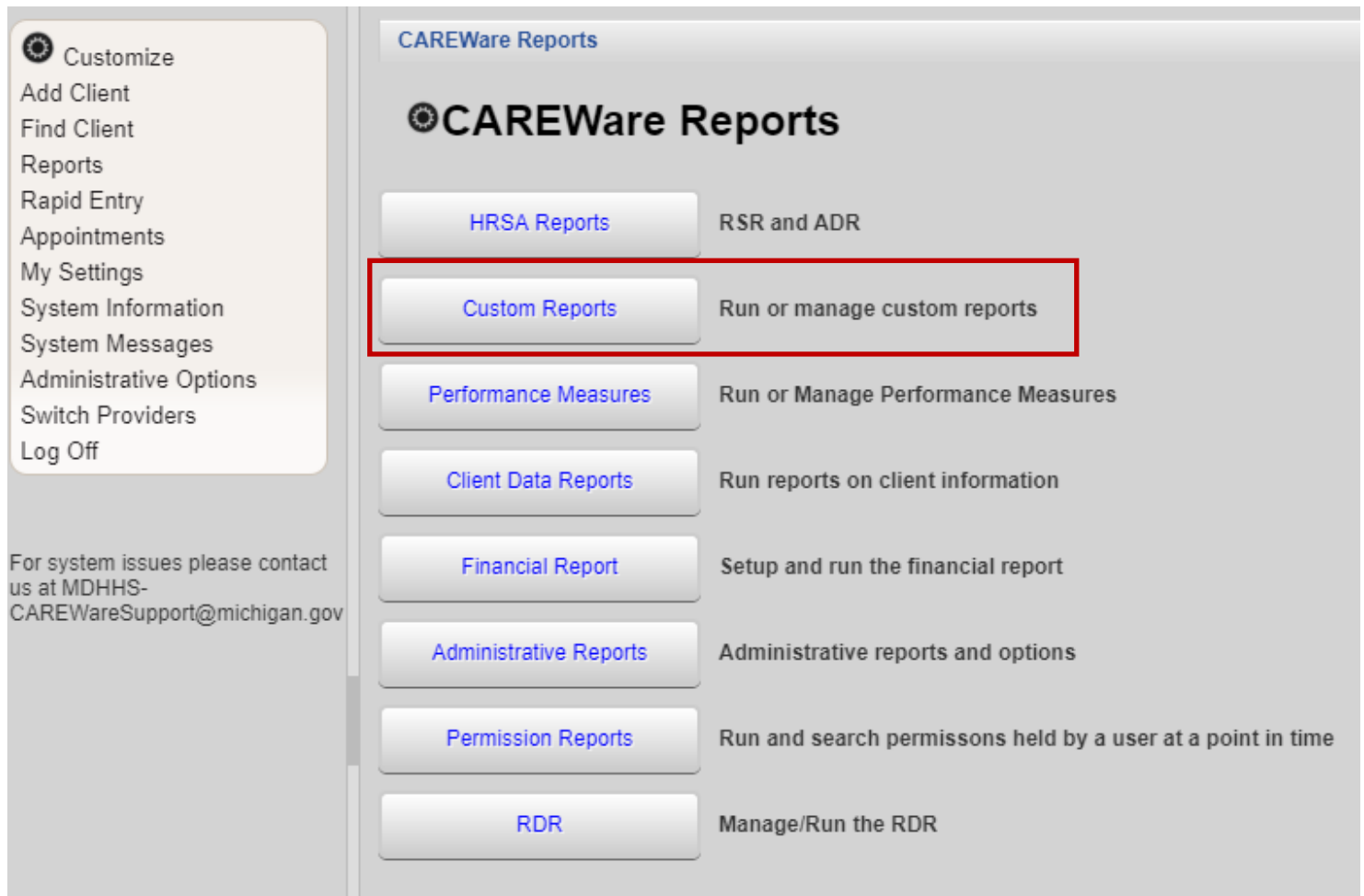
4. The [Customize](#) link allows you to configure the available menu items you see on the left-hand side. **It is not recommended to customize the menu;** instead, leave all of the options available. That way, you don't have to worry about leaving out a menu item that you may need in the future.

The screenshot shows the 'Customize menu items' page in CAREWare 6. The left-hand menu is visible, with the 'Customize' link highlighted by a red box. The main content area is titled 'Customize menu items' and contains a 'Personal Menu Settings' button and a link to 'Configure the available menu items for you'. The top navigation bar shows the path: Find Client > Search Results > Demographics > Customize menu items.

Pulling Not In Care List



1. Select **Reports** from the agency home page
2. Select “Custom Reports” from the CAREWare Reports page as directed below



Pulling Not In Care List Continued

3. Select **Manage/Run Custom Reports**

The screenshot shows the 'Custom Reports' page in the CAREWare system. On the left is a sidebar menu with options like 'Customize', 'Add Client', 'Find Client', 'Reports', 'Rapid Entry', 'Appointments', 'My Settings', 'System Information', 'System Messages', 'Administrative Options', 'Switch Providers', and 'Log Off'. The main content area has a breadcrumb trail 'CAREWare Reports > Custom Reports' and a 'Back' link. Below this is the 'Custom Reports' heading. Three buttons are visible: 'Manage/Run Custom Reports' (highlighted with a red box), 'Export Custom Reports', and 'Import Custom Reports from an xml file'. Each button has a corresponding description to its right.

Button	Description
Manage/Run Custom Reports	Run or manage custom reports
Export Custom Reports	Export custom report definitions to a portable xml file
Import Custom Reports from an xml file	Import custom report definitions from a portable xml file

4. Once new page opens, select **D2C NIC List (Priority)** options from this list of custom reports.

5. When "D2C NIC List (Priority)" is highlighted, select **Manage Run**

The screenshot shows the 'Manage Run Custom Reports' page. The breadcrumb trail is 'CAREWare Reports > Custom Reports > Manage Run Custom Reports'. A toolbar contains buttons: 'Manage Run' (highlighted with a red box), 'Add', 'Delete', 'Make Read Only', 'Back', 'Help', and 'Print or Export'. Below the toolbar is a search bar and a table of custom reports.

Name	CrossTab	Report Type	Description
D2C Case Investigation Outcomes (Quarterly)		Demographics	
D2C Service Outcomes		Service	
D2C Follow-up Date		Service	
D2C NIC Lab Dates		Demographics	
D2C NIC List (Priority)		Demographics	
D2C Case Investigation Outcomes (Yearly)		Demographics	

Note: To learn about the other D2C Custom Reports, please go to page _____

Pulling Not In Care List Continued

5. Select **Run Report**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C NIC List (Priority)

[Back](#)

D2C NIC List (Priority)

Run Report	Start Date : 06/26/2018, End Date : 06/26/2019, Clients with services, Report Display as : Open in New Window
Report Layout	D2C NIC List (Priority), Demographics
Field Selection	NIC List Number (Cln. Custom), URN, Last Name, First Name, DOB, Gender, State Number (Cln. Custom)
Report Filter	Report Filter is empty

6. Check the Date Range and Output Display

7. If you need to change them, select **Edit** from the top menu bar

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C NIC List (Priority) > Run Report

[Edit](#) [Run Report](#) [Back](#)

Run Report

Parameters

Date From: 6/26/2018

Date Through: 6/26/2019

Clinical Review Year: 2020

Output Display: Open in New Window

Show New Clients only: ☐

Show Clients with Service only: ☐

Show Specifications: ☐

Sum Numeric Fields: ☐

Domain Sharing Settings

Show Shared Service Records: ☐

Show Shared Clinical Records: ☐

Show Shared Custom Subform Records: ☐

Show Shared Case Notes: ☐

Pulling Not In Care List Continued

8. Change the Date Range for the time you are looking for
9. Change the Output Display to what you are looking for. Options are:
 - A. Open in New Window
 - B. Download as CSV (excel)
 - C. Open as PDF

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C NIC List (Priority) > Run Report > Edit

[Save](#) [Cancel](#)

Run Report

Parameters

Date From: 6/26/2018

Date Through: 6/26/2019

Clinical Review Year: 2020

Output Display: Open in New Window

Show New Clients only: ☐

Show Clients with Service only: ☐

Show Specifications: ☐

Sum Numeric Fields: ☐

Domain Sharing Settings

Show Shared Service Records: ☐

Show Shared Clinical Records: ☐

Show Shared Custom Subform Records: ☐

Show Shared Case Notes: ☐

Make sure to leave these unchecked!

10. [Save](#)

11. Select [Run Report](#)

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C NIC List (Priority) > Run Report

[Edit](#) [Run Report](#) [Back](#)

Run Report

Parameters

Date From: 6/26/2018

Date Through: 6/26/2019

Clinical Review Year: 2020

Output Display: Open in New Window

Show New Clients only: ☐

Show Clients with Service only: ☐

Show Specifications: ☐

Sum Numeric Fields: ☐

Domain Sharing Settings

Show Shared Service Records: ☐

Show Shared Clinical Records: ☐

Show Shared Custom Subform Records: ☐

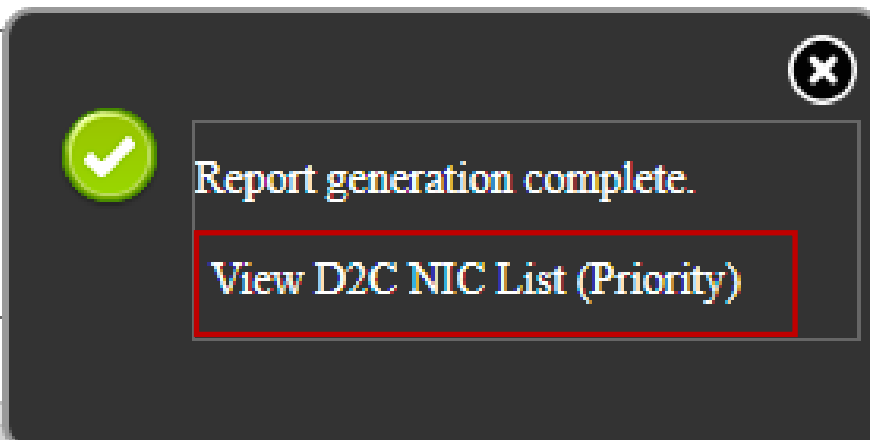
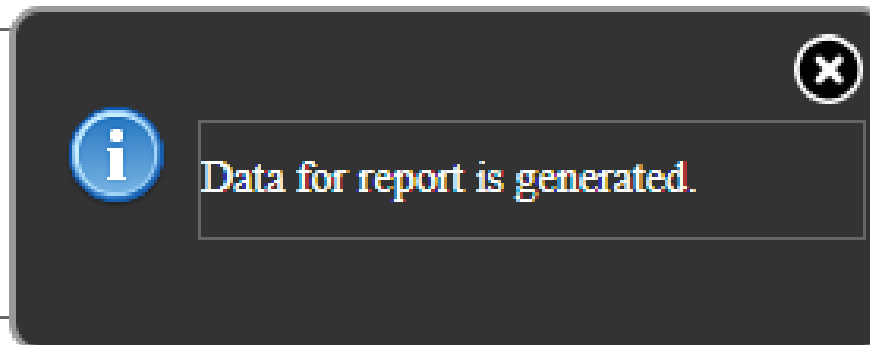
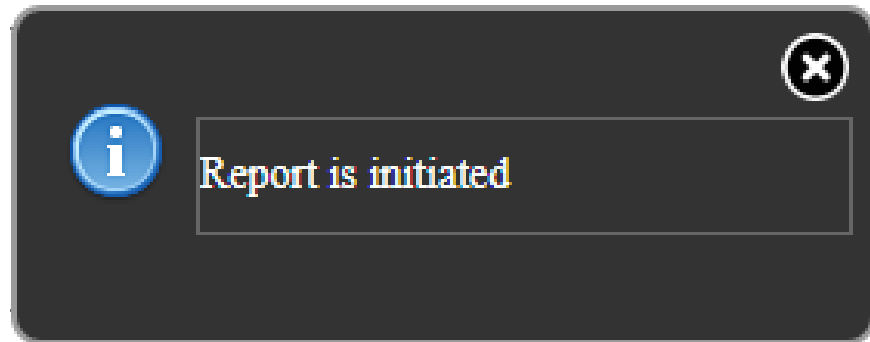
Show Shared Case Notes: ☐

Pulling Not In Care List Continued

While the report is generating, you will see the following series of notifications on the top right side of your screen

Once the Report generation is completed, you will see the third and final box.

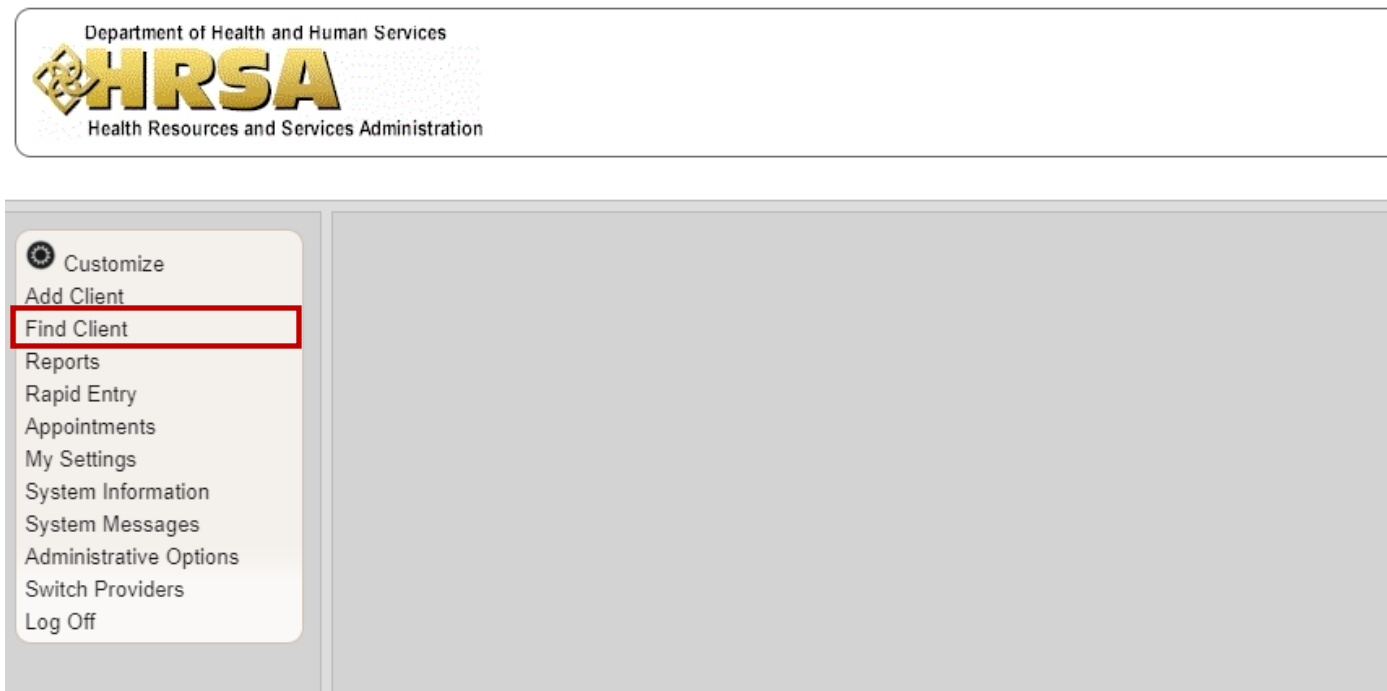
Click on the [View D2C NIC List \(Priority\)](#) link to pull up your NIC List



Put example and screen grabs of a sample Nic list would look like when pulled

How To Find a Client

1. Select **Find Client**.



2. A new tab will open. Enter the Last Name and First Name, or Client ID/URN.
3. Select **Client Search**.

Department of Health and Human Services
HRSA
Health Resources and Services Administration

For system issues please contact us at MDHHS-CAREWareSupport@michigan.gov


Find Client

Client Search

Find Client

Last Name:

First Name:

DOB: 

ClientID:

URNorEURN:

Encrypted UCI:

Active Only: ☐

State Number:

Note:

For Data to Care, make sure the "Active Only" box is **unchecked** to view all of your clients regardless of enrollment status.

This is the Demographics Page—Main Page

The screenshot shows a software interface for client management. On the left is a sidebar menu with options like 'Customize', 'Demographics', 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', 'Diagnoses', 'Sharing Requests', 'Referrals', 'Relations', 'Counseling and Testing', 'Orders', 'D2C Barriers', 'CRF Form', 'Historic Records', 'Appointments', 'User Messages', 'Search Change Details', 'Duplicate Client', 'Performance Measure Status', 'External Links', and 'Close'. The 'Demographics' option is highlighted with a red box. The main content area is titled 'Find Client > Search Results > Demographics' and includes 'Delete Client' and 'Back' links. Below this is a 'Demographics' section with several blue-lettered tabs: 'Personal Info', 'Change URN', 'Contact Information', 'Race/Ethnicity', 'HIV Risk Factors', 'Vital Enrollment Status', 'Eligibility', 'HIV Status', 'Common Notes', 'Provider Notes', and 'HIV Surveillance'. Each tab displays client information for 'John Doe'.

Tab	Client Information
Personal Info	Name: Doe, John Gender: Male DOB: 01/02/1988
Change URN	JHDE0102881U
Contact Information	109 W Michigan Ave Lansing, MI 48913
Race/Ethnicity	White
HIV Risk Factors	MSM AND IDU
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007
Common Notes	Preferred Name - JD Addition Phone # on file - 098-765-4321
Provider Notes	No description supplied
HIV Surveillance	View or Edit the client's HIV Surveillance information

This page holds all of the basic client information. Here are a few things you need to know:

- In order to add any records (such as Race/Ethnicity, HIV Risk Factor, or Contact Information) you must click the blue lettered tabs of the category you wish to edit (located in the middle of the page).
- All information on the demographic page is displayed next to the blue lettered tabs.
- Common notes are not permanent and can be viewed, edited, or deleted by anyone who has access to the client record. Therefore, common notes should only be used when it is something you want everyone to know about the client. If you want to enter something that will be permanently saved in CAREWare or is personal to the client, then enter it into **Case Notes**.
- Everything on the demographics page—with the exception of custom tabs, eligibility status, case notes, enrollment date and status—is shared with other providers that are also providing services to the client and can be changed by those providers.
- Custom tabs are now located on the demographics page.
- The left-hand side is how you will navigate all of the tabs of the client's record.

How to Add/Edit Information to the Demographics Page

1. From the main page, you can add, view, and edit various demographic information. To add or edit information, click the blue lettered tab of the category you wish to view or edit.

The screenshot shows the 'Demographics' page with a sidebar on the left containing a list of categories. The 'Contact Information' tab is highlighted with a red box. The main content area displays the following information:

- Personal Info:** Name: Doe, John Gender: Male DOB: 01/02/1988
- Change URN:** JHDE0102881U
- Contact Information:** 109 W Michigan Ave, Lansing, MI 48913
- Race/Ethnicity:** White
- HIV Risk Factors:** MSM AND IDU
- Vital Enrollment Status:** Vital Status: Alive Current Status: Active
- Eligibility:** Not Eligible for Ryan White
- HIV Status:** HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007
- Common Notes:** Preferred Name - JD, Addition Phone # on file - 098-765-4321
- Provider Notes:** No description supplied
- HIV Surveillance:** View or Edit the client's HIV Surveillance information

2. The tab will open. Enter or edit all relevant information.

3. **Save.**

Note: Some information has to be entered using a drop down menu. If a category has a drop down menu next to it, you must choose from the list provided.

The screenshot shows the 'Contact Information' form with the following fields:

- Address: 109 W Michigan Ave
- City: Lansing
- State: Michigan
- County: Ingham
- Zip Code: 48913
- Phone: 123-456-7890
- Phone Type: Mobile
- Include in mailing label reports?: ☐
- Mailing Address:
- Mailing City:
- Mailing State:
- Mailing Zip Code:
- Alt. Phone 1:
- Phone Type (Alt. Phone 1):
- Alt. Phone 2:
- Phone Type (Alt. Phone 2):

After you save, you will be taken back to the main page. You can view and edit other categories by clicking the blue tab of the category you wish to view and follow the same instructions. Some categories will require you to enter data while others will require you to check the appropriate box.

How To Edit Enrollment Status

When a client is added to CAREWare, the enrollment status will automatically be **Active** and vital status will be **Alive**. However, that information could change for people on your NIC List. The client may have been discharged from an agency or become inactive. You will need to add a record to reflect that. If enrollment or vital status changes, follow these instructions:

1. Open a client record. Enrollment Status is located on the demographics page.
2. Select **Vital Enrollment Status**.

The screenshot shows the 'Demographics' page in CAREWare. On the left is a sidebar menu with various options. The main content area has several tabs: Personal Info, Change URN, Contact Information, Race/Ethnicity, HIV Risk Factors, Vital Enrollment Status, Eligibility, HIV Status, Common Notes, Provider Notes, and HIV Surveillance. The 'Vital Enrollment Status' tab is selected and highlighted with a red rectangular box. The data for this tab shows: Vital Status: Alive, Current Status: Active.

3. Enter the NEW Enrollment or **Vital Status**. Choose from the dropdown menu.
4. **Save**.

This screenshot shows the 'Vital Enrollment Status' form. At the top, there is a breadcrumb trail: 'Find Client > Search Results > Demographics > Vital Enrollment Status'. Below this, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. The form contains several fields with dropdown menus and date pickers: Enrollment Status (set to Active), Enrollment Date, Latest Eligibility Status (set to Not Eligible for Ryan White), Vital Status (set to Alive), Case Closed Date, and Date of Death.

Note: When you change enrollment status from active, you will be prompted to enter a **Case Closed Date**. You will also be prompted to enter a **Date of Death** if you change vital status to deceased.

Pre-Service Investigation

1. To record all of your Pre-Investigation time in CAREWare and other places that you explore (TLO, MDSS), select **Screenings** on the menu bar on the left side of the page.

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info Name: Doe, John Gender: Male DOB: 01/02/1988

Change URN JHDE0102881U

Contact Information 109 W Michigan Ave
Lansing, MI 48913

Race/Ethnicity White

HIV Risk Factors MSM AND IDU

Vital Enrollment Status Vital Status: Alive Current Status: Active

Eligibility Not Eligible for Ryan White

HIV Status HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007

Common Notes Preferred Name - JD
Addition Phone # on file - 098-765-4321

Provider Notes No description supplied

HIV Surveillance View or Edit the client's HIV Surveillance information

2. Select **Add**

Find Client > Search Results > Demographics > Screenings

View **Add** Delete HL7 Source Print or Export

Screenings

Search:


Test Date	Test Definition Nar	Qualitative Result	Action/Treatment	Test Score	Test Comment
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Pre-Service Investigation Continued


Find Client > Search Results > Demographics > Screenings > Add

[Save](#) [Back](#)

Add

Test Date: 

Test Definition: 

Result: 

Test Score:

0-30 Mins

30-60 Mins

60-90 Mins

90-120 Mins

Test Comments:

3. Make sure you have the correct date of the pre-investigation screening
4. Select **D2C Pre-Service** from the dropdown box on the **Test Definition** line
5. Choose the timeframe you spent doing pre-investigation services from the **Results** line
6. Please enter in the comment box what services you conducted
7. Be sure to click **Save** on the menu bar when completed

How To Add Case Notes

1. Open the client record.
2. Select **Case Notes** from the menu of links on the left-hand side of the record.

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info	Name: Doe, John Gender: Male DOB: 01/02/1988
Change URN	JHDE0102881U
Contact Information	109 W Michigan Ave Lansing, MI 48913
Race/Ethnicity	White
HIV Risk Factors	MSM AND IDU
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007
Common Notes	Preferred Name - JD Addition Phone # on file - 098-765-4321
Provider Notes	No description supplied
HIV Surveillance	View or Edit the client's HIV Surveillance information

3. Select **Case Note Entry**.

Find Client > Search Results > Demographics > Case Notes

Back

Case Notes

Case Note Entry	Enter a new case note for the client
Case Note Report	Run a report on case notes entered for this client

Case Notes Continued

4. Select **Add**.

The screenshot shows a web application interface for entering case notes. On the left is a sidebar menu with options like 'Customize', 'Demographics', 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', 'Diagnoses', 'Sharing Requests', 'Referrals', and 'Relations'. The main area has a breadcrumb trail: 'Find Client > Search Results > Demographics > Case Notes > Case Note Entry'. Below this is a row of buttons: 'View', 'Add' (highlighted with a red box), 'Add With Templates', 'Delete', 'Manage Templates', 'Help', 'Back', and 'Print or Export'. The title 'Case Notes' is displayed. Below the title is a search bar labeled 'Search:'. At the bottom, there is a table with columns: 'Date', 'Provider', 'Author', and 'Case Note'.

5. Enter the **Date** of service and **Author** name (if applicable).
6. Enter **Case Note**.
7. **Save**.

The screenshot shows the 'Add' form for entering a case note. The breadcrumb trail is 'Find Client > Search Results > Demographics > Case Notes > Case Note Entry > Add'. Below this is a row of buttons: 'Save' (highlighted with a red box) and 'Back'. The form has the title 'Add'. It includes a 'Date' field with the value '12/20/2019' and a calendar icon. Below the date is an 'Add Service' checkbox. The 'Author' field is a text input with a user selection icon. The 'Case Note' field is a large text area. In the sidebar, 'Screening Labs' is highlighted.

Note: If you select the **Add Service** box, you will be directed to the services tab where you can enter the service for the client. This is a short cut to adding a service.

How To Add a Service

1. Open a client record. Select the **Services** tab from the menu of links on the left-hand side of the client record.

The screenshot shows the 'Demographics' tab selected in the left-hand menu. The main content area displays client information: Name: Doe, John; Gender: Male; DOB: 01/02/1988; URN: JHDE0102881U; Address: 109 W Michigan Ave, Lansing, MI 48913; Race/Ethnicity: White. The 'Services' tab is highlighted in the left-hand menu.

2. Select **Add**.

The screenshot shows the 'Services' tab selected in the left-hand menu. The main content area displays a table of services provided to the client. The 'Add' button is highlighted in the top navigation bar.

Date	Subservice	Contract	Units	Price	Total	Amount Recei
12/12/2019	D2C: Client Initiated	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/12/2019	D2C: Client Referre	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/10/2019	D2C: In-Person Mei	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/10/2019	D2C: Confirmed No	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/09/2019	D2C: Staff Initiated	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/02/2019	D2C: Letter Sent	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/02/2019	D2C: Staff Initiated	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00

3. Enter the **Date** the service was provided and select the **Service Name** from the subservice drop down list.

4. Click **NEXT**

The screenshot shows the 'Add Service' form. The 'Next' button is highlighted in the top navigation bar. The form fields are: Client: John Doe; Date: 12/20/2019; Service Name: D2C: Confirmed Not In Care. A red circle highlights the dropdown arrow icon next to the Service Name field.

Note: You cannot scroll through the drop down menu. Therefore, if you need to add a service that doesn't immediately appear when you click the drop down menu, enter the first couple of letters in the search box. From there, you can select the correct service. As a reference, please refer to page _____

How To Add a Service Continued....

- Once you enter the date and service, click **Next**. This will take you to the next phase of adding a service.

Find Client > Search Results > Demographics > Services > Add Service

Next Back

Add

Client: John Doe

Date: 12/30/2019

Service Name: D2C: Staff Initiated Call

- Enter the correct **Contract** and **Units**.

- Save**.

Find Client > Search Results > Demographics > Services > Add Service > Add Service

Save Back

Next

Client: John Doe

Date: 12/30/2019

Service Name: D2C: Staff Initiated Call

Contract: D2C: Non-Ryan White

Units: 1

Price: 0.00 \$

Total: 0.00 \$

Service Notes:

Follow-up Date:

Staff Initiated Phone Call Outcome:

- Follow-Up Date can be used to enter a date as a reminder to when you need to follow up with this client. You can run a custom report for Follow-Up Dates for your own records.
- The Outcome line will be different depending on which Service you choose. Each service will have a drop down list of what possible outcomes there are. Please refer to page _____ which has all of the Services and associated Outcomes.

How To Add a Service Continued....

7. If you need to edit a service, select the service that needs editing and then click **View**. From there, you can edit the service by selecting **Edit**.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Services](#)

[View](#) [Add](#) [Delete](#) [Receipts](#) [Help](#) [Print or Export](#)

Services

Search:


Date	Subservice	Contract	Units	Price	Total	Amount Received
12/12/2019	D2C: Client Referral	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/12/2019	D2C: Client Initiated	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/10/2019	D2C: Confirmed No	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/10/2019	D2C: In-Person Me	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/09/2019	D2C: Staff Initiated	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/02/2019	D2C: Staff Initiated	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00
12/02/2019	D2C: Letter Sent	D2C: Non-Ryan Wh	1	\$0.00	\$0.00	\$0.00

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Services](#) > [View](#)

[Edit](#) [Receipts](#) [Back](#)

View

Provider:

Date: 

Service Name:


Contract:

Units:

Price: \$

Total: \$

Service Notes:

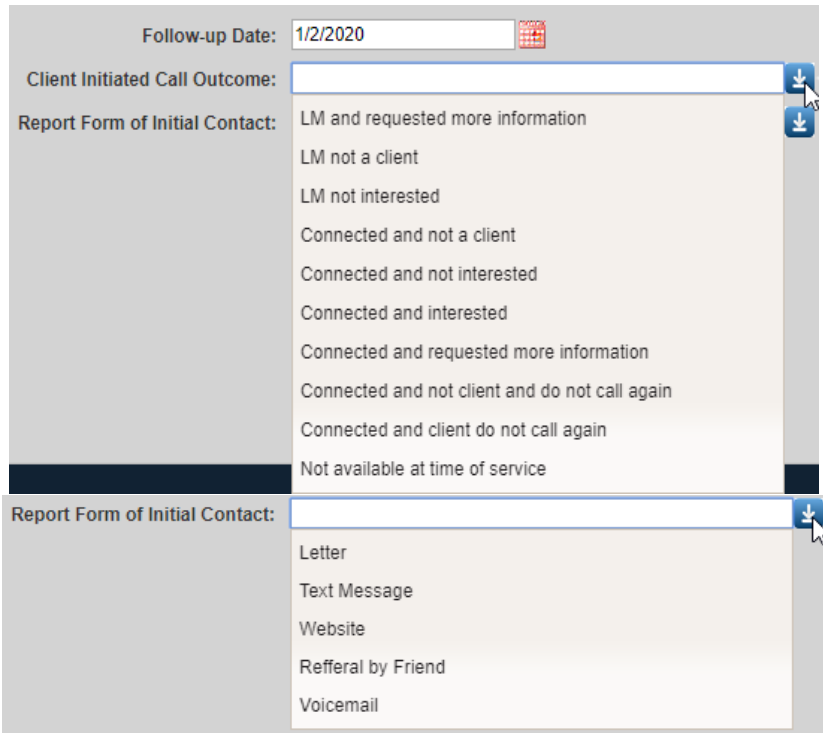
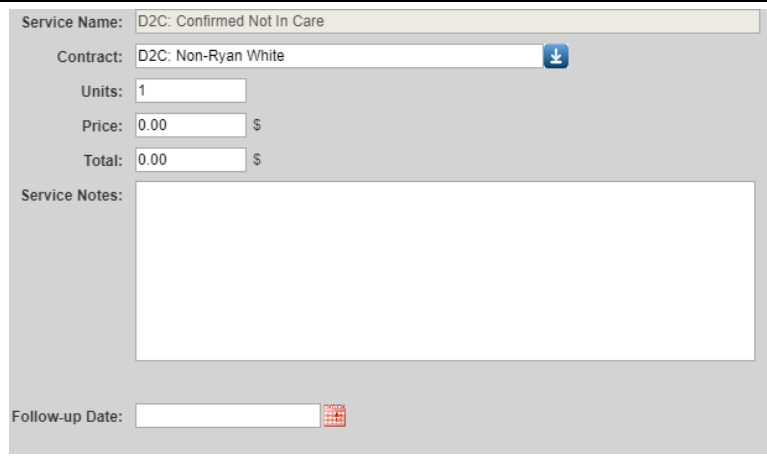
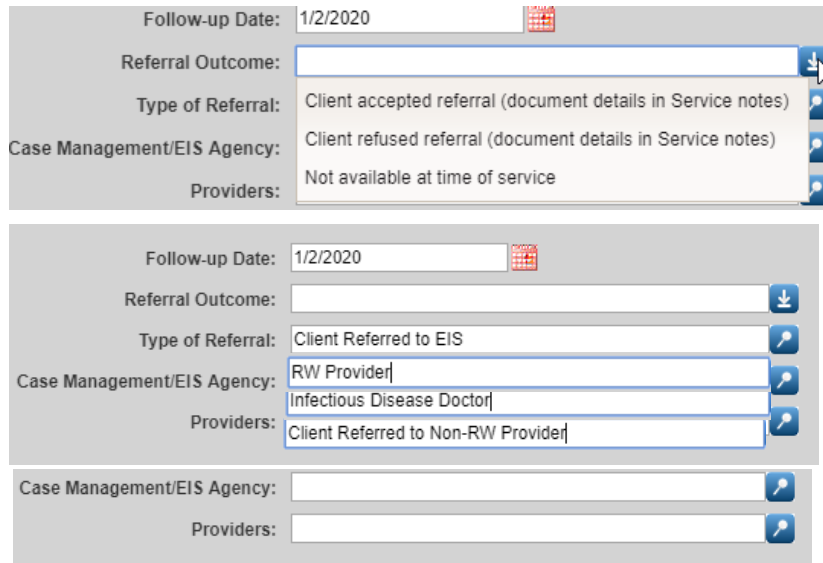
Follow-up Date: 

Client Initiated Call Outcome:

Report Form of Initial Contact:

8. **Save.**

List of Services, Outcomes and Units

SERVICE	OUTCOME	TIME or Units
Client Initiated Call If a client calls record the outcome of that call and then record why they called. Did they call because they received a letter? If so, choose letter from the drop down in the Report Form of initial contact.		If there is time spent talking with the client, record the amount of time in Units. 1 unit= 15 minutes
D2C Confirmed Not In Care If you can get into contact with a client and confirm that they are not in care, make sure you are utilizing this service.		Record this as One Unit.
Client Referred If a client is referred record whether they attended. If you do not know at the time of referral if they attended, choose Not available at time of service. When there is an outcome then this field can be updated. On this screen record the type of referral.		Record the amount of time in minutes spent on making the referral. 1 unit=15 minutes

Email sent Record emails sent. Record in Service Notes the email address. Record the outcome of the email including if the message was returned undeliverable.	<div> Email Outcome: <div> Client responded to email requested phone call Client responded to email declined service Client responded to email requested more information Client responded to email requested in person meeting Undeliverable Not available at time of service </div> </div>	Record each email as one unit.
In person Meet-up	<div> In-Person Meet-up Outcome: <div> Meet with person (document details in Service notes) No show Not available at time of service </div> </div>	Record the amount of time in minutes spent with the client. 1 unit=15 minutes
Staff initiated Call	<div> Staff Initiated Phone Call Outcome: <div> Client accepted service Disconnected Not a working number No answer, kept ringing Left message Phone belongs to Family/friend that answered (Left message) Phone # does not belong to client Family phone, left message Family/friend indicated client is deceased Call back Client is interested in services, call back </div> </div>	Record each phone call as one unit, but if time is spent communicating with the client record time 1 unit =-15 min...
Text message Received	<div> Text Message Outcome: <div> Sent text message Message returned as undeliverable Not client's number Client responded to message to continue conversation Client responded, but would prefer to have a call Not available at time of service </div> </div>	Record each text message received, but if time is spent communicating with the client record time 1 unit =-15 min..
Text Message sent	<div> Text Message Sent Outcome: <div> Undeliverable Not available at time of service Unable to determine at this time </div> </div>	Record each text message sent, but if time is spent communicating with the client record time 1 unit =-15 min..

How To Add/View a Lab

1. Open a client record. Select **Labs** or **Screening Labs** from the menu of links on the left-hand side of the client record. Each is a different tab, but the information is entered the same way.

Find Client > Search Results > Demographics > Labs

View Add Delete HL7 Source Help Print or Export

Labs

Search:

Date	Test Name	Test Operator	Test Result	Assay
12/30/2019	CD4 Count	=	678	
12/30/2019	Viral Load	=	20	

2. Click **Add**.

Find Client > Search Results > Demographics > Labs

View **Add** Delete HL7 Source Help Print or Export

Labs

Search:

Date	Test Name	Test Operator	Test Result	Assay
12/30/2019	CD4 Count	=	678	
12/30/2019	Viral Load	=	20	

3. Under the drop down menu, select the appropriate **lab**, **test operator**, and the **result**.
4. **Save**.

Find Client > Search Results > Demographics > Labs > Add

Save Back

Add

Date: 12/30/2019

Lab: Viral Load

Test Operator: =

Test Result: 20 (Copies/mL)

Assay:

Comment: Only add a comment if necessary |

Note: You cannot scroll through the drop down menu. In order to access the necessary lab, type in the first couple of letters of the lab in the search box.

HIV SURVEILLANCE

1. Click the **HIV Surveillance** tab on the demographics page.

Customize

Demographics

Client Report

Encounter Report

Services

Annual Review

Case Notes

Custom Forms

Vital Signs

Hospital Admissions

Medications

Labs

Screenings

Screening Labs

Immunizations

Diagnoses

Sharing Requests

Referrals

Relations

Counseling and Testing

Orders

D2C Barriers

CRF Form

Historic Records

Appointments

User Messages

Search Change Details

Duplicate Client

Performance Measure

Status

External Links

Close

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info

Name: Doe, John Gender: Male DOB: 01/02/1988

Change URN

JHDE0102881U

Contact Information

109 W Michigan Ave
Lansing, MI 48913

Race/Ethnicity

White

HIV Risk Factors

MSM AND IDU

Vital Enrollment Status

Vital Status: Alive Current Status: Active

Eligibility

Not Eligible for Ryan White

HIV Status

HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007

Common Notes

Preferred Name - JD
Addition Phone # on file - 098-765-4321

Provider Notes

No description supplied

HIV Surveillance

View or Edit the client's HIV Surveillance information

Custom Tab 2

View or Edit the client's Custom Tab 2 information

Custom Tab 3

View or Edit the client's Custom Tab 3 information

For system issues please contact
us at MDHHS-
CAREWareSupport@michigan.gov

HIV SURVEILLANCE CONTINUED

2. Once in HIV Surveillance page, you will see the following information imported from HIV Surveillance team.

Customize

Demographics
 Client Report
 Encounter Report
 Services
 Annual Review
 Case Notes
 Custom Forms
 Vital Signs
 Hospital Admissions
 Medications
 Labs
 Screenings
 Screening Labs
 Immunizations
 Diagnoses
 Sharing Requests
 Referrals
 Relations
 Counseling and Testing
 Orders
 D2C Barriers
 CRF Form
 Historic Records
 Appointments
 User Messages
 Search Change Details
 Duplicate Client
 Performance Measure
 Status
 External Links
 Close

[Find Client](#) > [Search Results](#) > [Demographics](#) > [HIV Surveillance](#)

[Edit](#) [Back](#)

HIV Surveillance

Data 2 Care:

☐

SHINe:

☐

Medical Monitoring Project:

☐

Priority Investigation:

☐

First Name (Last known):

Middle Name (Last known):

Last Name (Last known):

Date of Birth:

Gender (Epi):

Sex at Birth (Epi):

Street (Epi):

City (Epi):

Zip Code (Epi):

Phone (Epi):

Date Most Recently on NIC List:

Date First on NIC List:

NIC Category:

Name of facility at HIV diagnosis:

Phone number of facility at HIV diagnosis:

First name of provider at HIV diagnosis:

Last name of provider at HIV diagnosis:

Name of facility at AIDS diagnosis:

Phone number of facility at AIDS diagnosis:

First name of provider at AIDS diagnosis:

Last name of provider at AIDS diagnosis:

Prison Status:

Prison Number:

Location of Last Labs:

NIC List Number:

Risk Factor (Epi):

County (Epi):

Race (Epi):

HIV Diagnosis Date:

AIDS Date (Epi):

State Number (Epi):

*This information can be used during pre-investigation. This is information that Surveillance has that may be beneficial to finding information on a client.

D2C Barriers

1. Select the **D2C Barriers** option from the menu on the left hand side

The screenshot displays a web application interface. On the left is a sidebar menu with a 'Customize' icon at the top. The menu items include: Customize, Demographics, Client Report, Encounter Report, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, Screenings, Screening Labs, Immunizations, Diagnoses, Sharing Requests, Referrals, Relations, Counseling and Testing, Orders, **D2C Barriers** (highlighted with a red box), CRF Form, Historic Records, Appointments, User Messages, Search Change Details, Duplicate Client, Performance Measure Status, External Links, and Close. At the bottom of the sidebar, contact information for MDHHS-CAREWareSupport@michigan.gov is provided.

The main content area has a breadcrumb trail: 'Find Client > Search Results > Demographics'. Below this are links for 'Delete Client' and 'Back'. The title 'Demographics' is displayed with a gear icon. The content is organized into a series of tabs, each with a button and associated data:

Tab	Content
Personal Info	Name: Doe, John Gender: Male DOB: 01/02/1988
Change URN	JHDE0102881U
Contact Information	109 W Michigan Ave Lansing, MI 48913
Race/Ethnicity	White
HIV Risk Factors	MSM AND IDU
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007
Common Notes	Preferred Name - JD Addition Phone # on file - 098-765-4321
Provider Notes	No description supplied
HIV Surveillance	View or Edit the client's HIV Surveillance information
Custom Tab 2	View or Edit the client's Custom Tab 2 information
Custom Tab 3	View or Edit the client's Custom Tab 3 information

D2C Barriers

2. Select **Add** to add new barriers

The screenshot shows a web application interface for adding D2C barriers. On the left is a sidebar menu with options like 'Customize', 'Demographics', 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', 'Diagnoses', 'Sharing Requests', 'Referrals', 'Relations', 'Counseling and Testing', 'Orders', and 'D2C Barriers'. The main content area has a breadcrumb trail: 'Find Client > Search Results > Demographics > D2C Barriers'. Below the breadcrumb are links: 'View', 'Add' (highlighted with a red box), 'Delete', and 'Print or Export'. The title 'Custom Subform' is displayed. A search bar is present. Below it is a table with columns: 'Subform Date', 'Provider', 'Explicitly Discussed', 'Conversational Barriers', 'Physicians/Clinics', and 'Insurance'.

3. Select correct date
4. Select whether barriers were **Explicitly Discussed** or **Conversational**
5. Select an option from each dropdown is applicable

This screenshot shows the 'Add' form for D2C barriers. The breadcrumb trail is 'Find Client > Search Results > Demographics > D2C Barriers > Add'. There are 'Save' (highlighted with a red box) and 'Back' buttons. The form title is 'Add'. It contains the following fields:

- 'Subform Date:' with a text input field and a calendar icon.
- 'Explicitly Discussed Barriers:' with a checkbox.
- 'Conversational Barriers:' with a checkbox.
- 'Physicians/Clinics:' with a dropdown menu.
- 'Insurance:' with a dropdown menu.
- 'Health and personal preferences:' with a dropdown menu.
- 'Psychosocial issues:' with a dropdown menu.

NOTE: You will only be able to choose one option from each drop down box at a time. IF you need to select more than one option from a single drop down, save the first one and repeat steps 2 - 5.

D2C Barriers Dropdown Options

Physicians/Clinics:	<input type="text"/>	↓	Click here to select from 6 choices.
Insurance:	Could not find a Doctor	↓	
Health and personal preferences:	Doesn't like/trust Doctor	↓	
Psychosocial issues:	Inconvenient clinic hours	↓	
	Inconvenient clinic location		
	Wait too long		
	Could not get appointment		

Physicians/Clinics:	<input type="text"/>	↓	Click here to select from 2 choices.
Insurance:	<input type="text"/>	↓	
Health and personal preferences:	No health insurance	↓	
Psychosocial issues:	Insured but medical costs too high	↓	

Physicians/Clinics:	<input type="text"/>	↓	Click here to select from 7 choices.
Insurance:	<input type="text"/>	↓	
Health and personal preferences:	<input type="text"/>	↓	
Psychosocial issues:	Doesn't want to think about HIV	↓	
	Prefer alternative therapies		
	Feel good so why be in care		
	Feel too sick can't get to care		
	Faith in God		
	Have not disclosed to friends and/or family		
	Not sure if really HIV positive		

Physicians/Clinics:	<input type="text"/>	↓	Click here to select from 8 choices.
Insurance:	<input type="text"/>	↓	
Health and personal preferences:	<input type="text"/>	↓	
Psychosocial issues:	<input type="text"/>	↓	
	No reliable transportation		
	Mental health		
	Forget appointments		
	Drinking and/or Drug use		
	Lack of stable housing/homeless		
	Incarcerated		
	Language barriers		
	Day to day responsibilities		

Case Investigation Outcome

1. Click **Screenings**

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info Name: Doe, John Gender: Male DOB: 01/02/1988

Change URN JHDE0102881U

Contact Information 109 W Michigan Ave
Lansing, MI 48913

Race/Ethnicity White

HIV Risk Factors MSM AND IDU

Vital Enrollment Status Vital Status: Alive Current Status: Active

Eligibility Not Eligible for Ryan White

HIV Status HIV-positive (AIDS status unknown) Estimated HIV Date: 03/04/2007

Common Notes Preferred Name - JD
Addition Phone # on file - 098-765-4321

Provider Notes No description supplied

HIV Surveillance View or Edit the client's HIV Surveillance information

2. Select **Add**

Find Client > Search Results > Demographics > Screenings

View **Add** Delete HL7 Source Print or Export

Screenings

Search:


Test Date	Test Definition Nar	Qualitative Result	Action/Treatment	Test Score	Test Comment
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Case Investigation Outcome Continued


Find Client > Search Results > Demographics > Screenings > Add


[Save](#) [Back](#)

Add

Test Date: 1/16/2020 

Test Definition: D2C Case Investigation Outcome 

Result: 

Action: 

Test Score:

Test Comments:

3. Make sure you have the correct date of the Case-Investigation Outcome
4. Select **D2C Case Investigation Outcome** from the dropdown box on the **Test Definition** line
5. Choose the Case Investigation Outcome from the **Results** line (List of Outcomes and definitions are on the next page)
6. Please enter in the comment box with an explanation of the disposition
7. Be sure to click **Save** on the menu bar when completed

Case Investigation Outcome Definitions

Accepted Linkage to Care Services – Linked to Care

A client verbally gives the contact at the LHD permission to be linked to either an EIS provider or medical provider by the LHD.

Data Error

To be used when there is a duplicate record for someone with a misspelled name or incorrect demographic information – Determined by contacting the individual, through TLO, and should only be used after consultation with [Jacob Watson](#).

Deceased

Determined through contact with a family member or through TLO.

Declined Linkage to Care Services

Even in the case of a no, LS should ensure that the individual knows that they can always initiate contact back to the LHD at any time, should they change their mind.

In Care

Can be determined by:

CAREWare services documented from a provider:

- Services must be verified by a call to that provider from the LS
- Client self-report
- Every effort should be made to get details from client about where they are attending care, and the LS should follow up with that provider and MDHHS Surveillance to determine why labs are missing from the record
- If client does not disclose where they are receiving care, a follow up call should be made in the next few weeks to determine if they are willing to discuss where care is received.

In cases where the LS cannot verify the clients self-report of in care with a qualified provider, the LS should verify by researching Labs and/or pharmacy data. If lab and pharmacy data cannot confirm care, the case is dispositioned as “not in care” but noted that client reports an “in care” status; but care cannot be verified.

Do Not Ever Contact Again

This should be used when requested that they are never called again and requests that their information is removed from the contact list indefinitely. This will need to be [documented and sent back to MDHHS Surveillance](#), so their contact information will never reappear on the NIC list. A no is dispositioned in CW as **Declined Linkage to Care Services**. Even in the case of a no or a do not contact again, LS should ensure that the individual knows that they can always initiate contact back to the LHD at any time, should they change their mind.

Institutionalized

Can be reported by a family member or person close to the individual (neighbor, former partner, etc.). As much information, as politely possible, should be collected about location and length of incarceration. If the person is determined to be in a Michigan prison, the information should be verified with [UNIFIED, the HIV case management and reentry referral service](#). A Unified case manager can investigate the prison locating system. If the individual is incarcerated in Michigan, the LS will work with the UNIFIED's case manager to ensure the individual is re-enrolled in HIV care. If the individual is in a county jail, please contact Project Coordinator for technical assistance.

Not Positive

Can be determined by:

1. Client self-report

- Every effort should be made to get details from client about where and when they tested negative, and then LS should follow up with MDHHS Surveillance and the provider to try and get copy of negative labs
- If client does not disclose where they tested negative, a CRF should be completed so MDHHS Surveillance can investigate
- In cases where care cannot be verified, case is still dispositioned as "positive", but noted that it is not verified by client.

2. CAREWare documentation as negative from another provider

- Verified by a call to that provider and documented by the LS or other designated HD staff.

Likely Does Not Exist

Proof of identity is not required to take an HIV test. Anecdotally, the LHD knows that many people, particularly in the 1980's and 1990's tested under alias names and date of birth. Records will be closed out as "Likely does not exist" should a person have ALL OF THE ABOVE:

1. No address or letters returned from the individuals known addresses.
2. No phone number or the only known phone number is disconnected or does not belong to the individual.
3. No information available after exhausting all other avenues including TLO, any other local, state surveillance databases, health department records, or clinical records.

Unable to Locate

Individuals will be closed out as "unable to locate" should they:

1. Have no working phone number, which include:

- All Phone numbers provided by MDHHS
- All phone numbers with over 60% match likelihood from TLO
- Contact is attempted for each disconnected phone number a minimum of three to four times, In the event the number has been reconnected.

2. No known address OR letters returned from all possible addresses

- This may also Include phone calls received informing LS that the individual does not live at the indicated address.

3. Unable to locate must not be used unless the LHD explores **all database/resource** options and perform due diligence to ensure that every avenue has been explored to obtain contact in

4. Formation for every individual on the NIC list.

Moved out of State

Individuals will be closed out as “moved out of state” should:

1. The LHD staff receives a call from a household member stating the individual moved out of state
2. TLO shows only out of state addresses for a minimum 2 recent years
3. The individual tells the LHD staff they live out of state
 - In the case the LS speaks to the individual, they will inquire about HIV care and if they were able to transfer their medical care
 - If the LS does not speak to the individual directly, no follow-up is done to confirm the individual is in care.
4. HIV Surveillance has been consulted to make an out of state call with the surveillance department of the other state in question.

Out of Jurisdiction

Individuals will be closed out as “moved out of Jurisdiction” should:

1. The LHD staff receives a call from a household member stating the individual moved out of the county/jurisdiction or area
2. TLO shows only out of county/jurisdiction or area addresses for a minimum 2 recent years.
3. The individual tells the LHD staff they live out of county/jurisdiction or area.
4. In the case the LS speaks to the individual, they will inquire about HIV care and if they were able to transfer their medical care
 - If the LS does not speak to the individual directly, no follow-up is done to confirm the individual is in care.
5. HIV Surveillance has been consulted to make an out of county/jurisdiction or area call with the other county/jurisdiction or area in question.
6. If the client has moved out of the county, please note this in the comments box.

Other

To be used when no other disposition makes sense. **Each time ‘Other’ is chosen, text must be entered to explain the disposition. Example include:**

Individual returns call and informs the LHD that they used to test under that name as an alias, and they are in care under their correct name, but do not wish to share their actual name, so care cannot be verified.

Common Notes

1. Click Common Notes

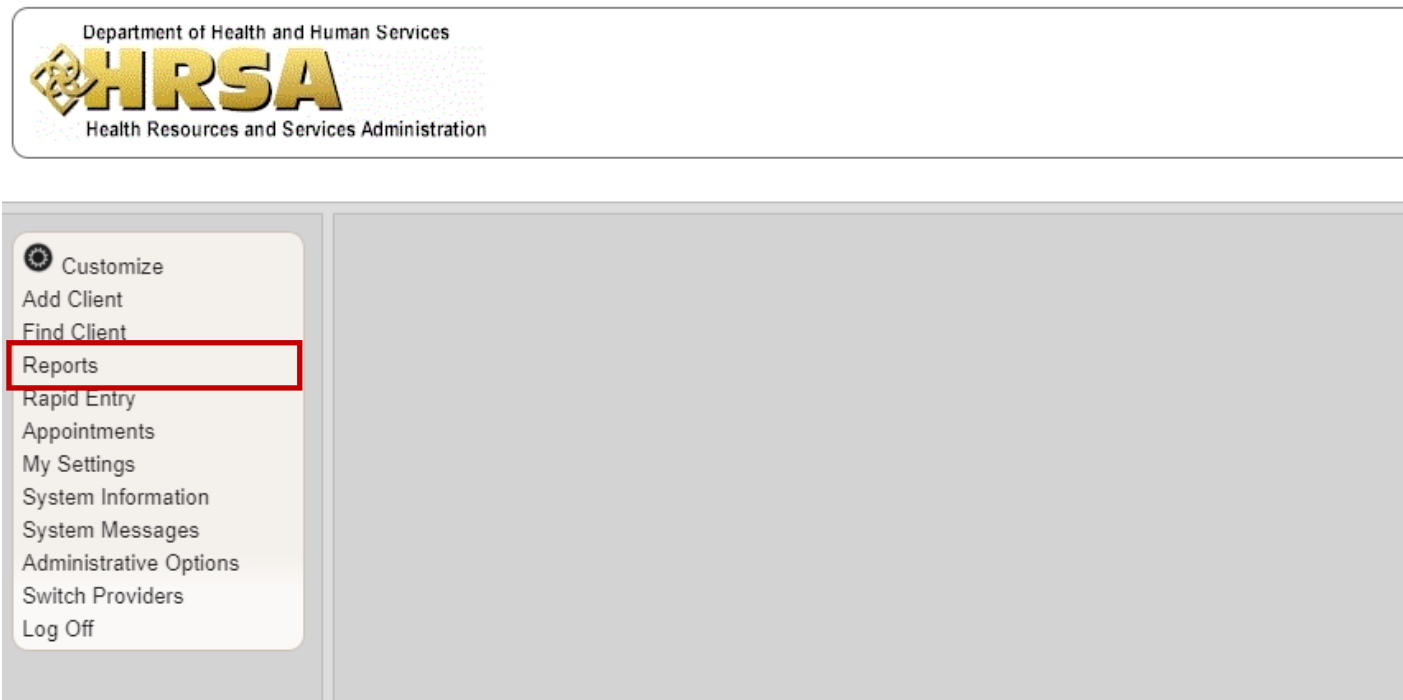
The screenshot shows the 'Demographics' page for a client named John Doe. The left sidebar contains a menu with options like 'Customize', 'Demographics', 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', 'Diagnoses', 'Sharing Requests', 'Referrals', 'Relations', 'Counseling and Testing', 'Orders', 'D2C Barriers', 'CRF Form', 'Historic Records', 'Appointments', 'User Messages', 'Search Change Details', 'Duplicate Client', 'Performance Measure Status', 'External Links', and 'Close'. The main content area has a breadcrumb trail: 'Find Client > Search Results > Demographics'. Below this are 'Delete Client' and 'Back' buttons. The 'Demographics' section contains several tabs: 'Personal Info', 'Change URN', 'Contact Information', 'Race/Ethnicity', 'HIV Risk Factors', 'Vital Enrollment Status', 'Eligibility', 'HIV Status', 'Common Notes' (highlighted with a red box), 'Provider Notes', 'HIV Surveillance', 'Custom Tab 2', and 'Custom Tab 3'. The 'Common Notes' tab shows the text: 'Preferred Name - JD' and 'Addition Phone # on file - 098-765-4321'.

2. Enter any new contact information you have gathered that would be beneficial to contacting/locating client

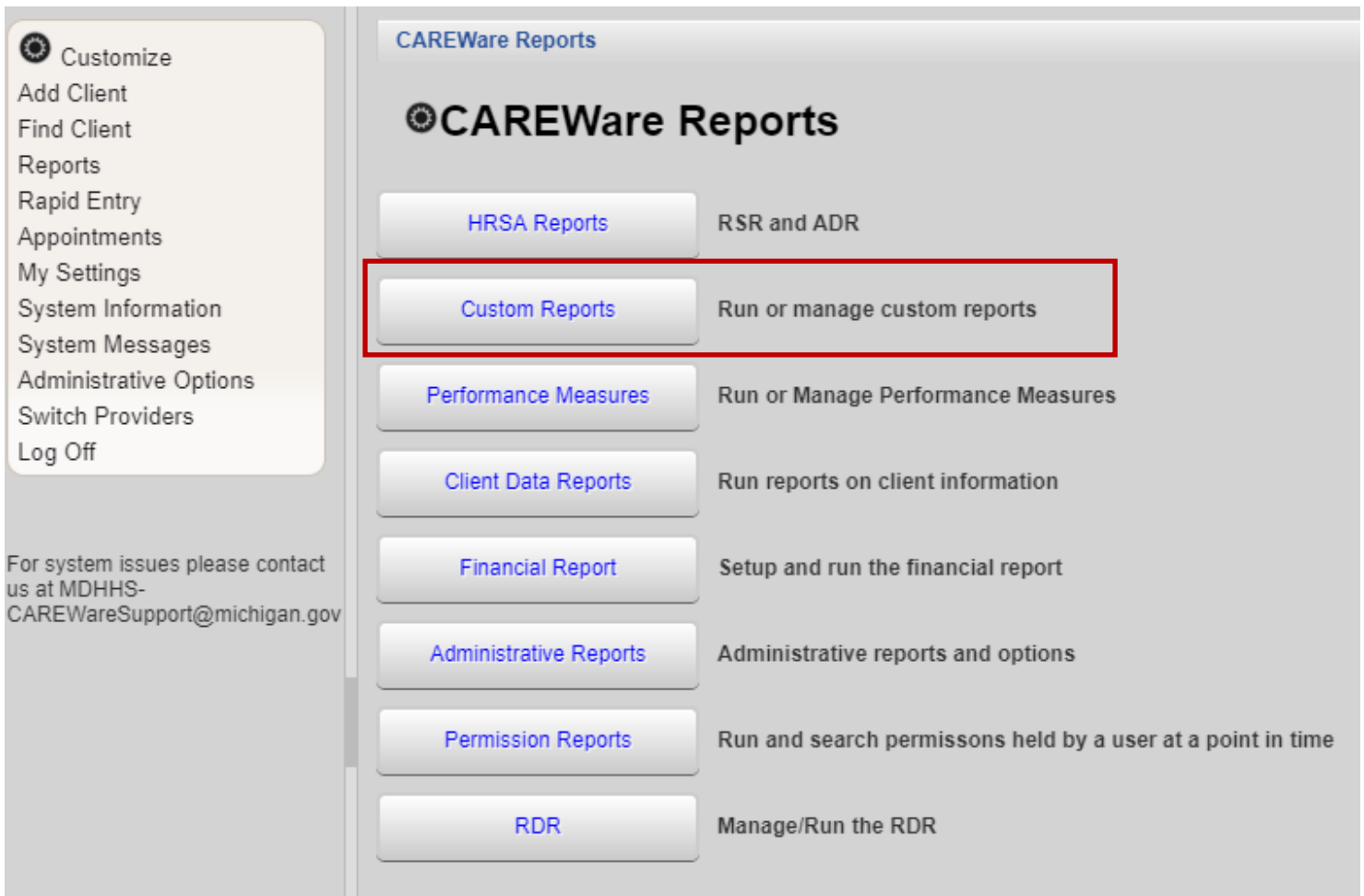
The screenshot shows the 'Common Notes' page for the same client. The breadcrumb trail is 'Find Client > Search Results > Demographics > Common Notes'. At the top, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. Below the buttons is a large text area for entering notes. The text area contains the text: 'Preferred Name - JD' and 'Addition Phone # on file - 098-765-4321'.

3. Save

Custom Reports



1. Select [Reports](#)
2. Select [Custom Reports](#) once CAREWare Reports page opens



Custom Reports Continued

3. Select **Manage/Run Custom Reports**

The screenshot shows the 'Custom Reports' page in the CAREWare system. On the left is a sidebar with a 'Customize' menu containing options like 'Add Client', 'Find Client', 'Reports', 'Rapid Entry', 'Appointments', 'My Settings', 'System Information', 'System Messages', 'Administrative Options', 'Switch Providers', and 'Log Off'. The main content area has a breadcrumb trail 'CAREWare Reports > Custom Reports' and a 'Back' link. Below this is the 'Custom Reports' title. Three buttons are visible: 'Manage/Run Custom Reports' (highlighted with a red box), 'Export Custom Reports', and 'Import Custom Reports from an xml file'. Each button has a corresponding description to its right.

Button Label	Description
Manage/Run Custom Reports	Run or manage custom reports
Export Custom Reports	Export custom report definitions to a portable xml file
Import Custom Reports from an xml file	Import custom report definitions from a portable xml file

4. Choose the report you are looking to run

5. Once the report you want is highlighted, click **Manage Run** to run that report

The screenshot shows the 'Manage Run Custom Reports' page. The breadcrumb trail is 'CAREWare Reports > Custom Reports > Manage Run Custom Reports'. Below the breadcrumb is a row of action links: 'Manage Run' (highlighted with a red box), 'Add', 'Delete', 'Make Read Only', 'Back', 'Help', and 'Print or Export'. Below these links is the title 'Manage/Run Custom Reports' and a search bar. A table lists several reports with columns for 'Name', 'CrossTab', 'Report Type', and 'Description'.

Name	CrossTab	Report Type	Description
D2C Case Investigation Outcomes (Quarterly)		Demographics	
D2C Service Outcomes		Service	
D2C Follow-up Date		Service	
D2C NIC Lab Dates		Demographics	
D2C NIC List (Priority)		Demographics	
D2C Case Investigation Outcomes (Yearly)		Demographics	

Custom Reports Continued

6. Select **Run Report**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C Case Investigation Outcomes

Back

D2C Case Investigation Outcomes

Run Report

Start Date : 06/26/2018, End Date : 06/26/2019, Report Display as : Open in New Window

Report Layout

D2C Case Investigation Outcomes, Demographics

Field Selection

URN, State Number (Cln. Custom), Date, Case Investigation Outcome, First Contact Date

Report Filter

Received Lab or Screening (Any Test = D2C Case Investigation Outcome AND Date Range Between 12 AND 0 months before the end date or as of date (6/26/2018 And 6/26/2019).) = Yes

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C Service Outcomes

Back

D2C Service Outcomes

Run Report

Start Date : 10/01/2019, End Date : 12/31/2019, Report Display as : Open as PDF

Report Layout

D2C Service Outcomes, Service

Field Selection

URN, Srv Long Name, Srv Date, Srv Qty, Transport Outcome (Srv. Custom), Text Message Outcome (Srv. Custom), Staff Initiated Phone Call Outcome (Srv. Custom), Received Call (Not Client) Outcome (Srv. Custom), Letter Returned Outcome (Srv. Custom), In-Person Meet-up Outcome (Srv. Custom), Referral Outcome (Srv. Custom), Email Outcome (Srv. Custom), Client Initiated Call Outcome (Srv. Custom), 1st Overall Service, Service Note ..

Report Filter

Subservice Count by Funding (Service funding source = Other AND Cross-Provider = No) >= 1

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C Follow-up Date

Back

D2C Follow-up Date

Run Report

Start Date : 10/01/2019, End Date : 12/31/2019, Report Display as : Open as PDF

Report Layout

D2C Follow-up Date, Service

Field Selection

State Number (Cln. Custom), Name, Srv Long Name, Srv Date, Follow-up Date (Srv. Custom), Service User

Report Filter

Follow-up Date (Srv. Custom) >= 10/21/2018 <= 10/25/2018

Custom Reports Continued

7. Select **Edit** if you need to change the Date Range or Output Display
8. Change the Date Range for the time you are looking for
9. Change the Output Display to what you are looking for. Options are:

- A. Open in New Window
- B. Download as CSV (excel)
- C. Open as PDF

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C NIC List (Priority) > Run Report > Edit

Save Cancel

Run Report

Parameters

Date From: 6/26/2018

Date Through: 6/26/2019

Clinical Review Year: 2020

Output Display: Open in New Window

Show New Clients only: ☐

Show Clients with Service only: ☐

Show Specifications: ☐

Sum Numeric Fields: ☐

Domain Sharing Settings

Show Shared Service Records: ☐

Show Shared Clinical Records: ☐

Show Shared Custom Subform Records: ☐

Show Shared Case Notes: ☐

Make sure to leave these unchecked!

10. **Save**

11. Select **Run Report**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > D2C NIC List (Priority) > Run Report

Edit Run Report Back

Run Report

Parameters

Date From: 6/26/2018

Date Through: 6/26/2019

Clinical Review Year: 2020

Output Display: Open in New Window

Show New Clients only: ☐

Show Clients with Service only: ☐

Show Specifications: ☐

Sum Numeric Fields: ☐

Domain Sharing Settings

Show Shared Service Records: ☐

Show Shared Clinical Records: ☐

Show Shared Custom Subform Records: ☐

Show Shared Case Notes: ☐

QUESTIONS?

If you have any questions, please email us at MDHHS-LinkUpMI@michigan.gov

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If you have any issues with logging into CAREWare or other issues related directly to CAREWare, please email our CAREWare Team at MDHHS-CAREWARESUPPORT@michigan.gov